APPENDIX A

Load workstation	Load a previously saved workstation into the configurator for editing
Browse applicable items	Allows users to efficiently browse through the subset of items that are applicable to the type of workstation that they are editing. users will be able to view the item and its attributes -- including the appropriate price (based upon the user's login)
Add and remove items from workstations	This is the function used to customize a workstation. Users will be able to drag items from a palette and drop them on their workstation (e.g., add a shelf, add an open box, etc.). They will also be able to remove items by visually designating them and selecting a remove function.
Arrange items on workstations	Users will be able to visually move items on workstations by dragging and dropping them. The system will only allow users to place items on appropriate points, and a "snap to" function will aid users by automatically moving items (when a user drops) to the nearest appropriate point. For wall units, snap will apply horizontally from rail to rail only, with vertical positioning allowed anywhere on a rail.
Select item option	The system will allow users to select between item options (e.g. color) and then render the item using the option.
Save user custom workstation	A user must be registered to save. The function will save the configuration of the current workstation that the user has loaded in the configurator, overwriting any previously saved configuration.
Save user workstation with new title	This function will save the configuration of current workstation that the user has loaded in the configurator as a new named workstation.
View position	The system will provide some mechanism to allow users to determine the relative position where they have placed an item -- especially for key items (e.g. as a user is placing a work surface, some sort of pop up text that says something like "most people find

	that the optimal worksurface height for a seated position is xx-xx inches from the floor"). It is important that this function does not disrupt the user's flow (e.g. bring up a pop up window) as he configures the workstation.
View dimensions & price	Function that allows the user to view the current length, width, height and price of the workstation being configured.
Add to cart	Adds the workstation in its current configuration to the user's current order.
View workstation description	Allows user to view descriptions and notes related to their configuration. If the base workstation was a predefined configuration from Round Three, the description information will be more rich and may include things like a photograph of that workstation configuration in an office setting or an audio recording of Richard describing the purpose and benefits of the configuration. For user defined workstations these descriptions will only be text.
Edit/add workstation description	Allows users to add and edit descriptions and notes related to their configuration.
Display/print assembly instructions	Displays assembly, installation and use instructions for the workstation.
Simple print configuration	Produce a simple "print screen" version of the configuration for printing.
PDF version of configuration	Create a slick PDF printable version of the configuration
Create upgrade kit	Creates and saves a list of item changes to the workstation since it was loaded (including the change in price). This kit can be ordered as set. Round Three thinks that this functionality will be very useful immediately following launch. Although it has been prioritized out of phase 1 for now, the team should give it top priority in phase 2 or, if possible, deliver early as part of phase 1.
Email Configuration	This function will allow the user to make one of his custom configurations visible to another user. The system will generate a URL that will allow the other

	user to access the configuration and email it. When the second user visits the URL, the system will load a copy of the workstation configuration into the configurator.
Browse items	Allows users to browse through all of the items that they could add to a workstation, order, or a suite. Users will be able to view the item and its attributes -- including the appropriate price (based upon the user's login). The items' attributes may include rich media such as an audio recording of Richard describing the materials used in constructing the item, its durability, etc.
Browse Standard Mfg.'s workstations	Allows users to efficiently browse through those workstation configurations that were created by Round Three. Users will be able to view the workstations and their attributes - including the appropriate price (based upon the user's login).The attribute information may contain rich media like a photograph of that workstation configuration in an office setting or an audio recording of Richard describing the purpose and benefits of the configuration.
Browse user custom workstations	Allows users to efficiently browse through the set of workstation configurations that they created and saved themselves (these will not be visible to other users). Users will be able to view the workstations and their attributes including the appropriate price (based upon the user's login)
Browse customer defined workstations	Allows users to efficiently browse through those workstation configurations that were created by other customers, submitted to the gallery, and approved for viewing by Round Three. Users will be able to view the workstations and their attributes - including the appropriate price (based upon the user's login).
Browse Standard Mfg.'s Suites	Allows users to efficiently browse through those suite configurations that were created by Round Three. Users will be able to view the suite and their attributes -- including the appropriate price (based upon the user's login). The attribute information may include rich media like a photograph of that suite configuration in an office setting or an audio

	recording of Richard describing the purpose and benefits of the configuration.
Browse user custom suites	Allows users to efficiently browse through those suite configurations that were created by other customers, submitted to the gallery, and approved for viewing by Round Three. Users will be able to view the suites and their attributes -- including the appropriate price (based upon the user's login).
Browse customer defined suites	Allows users to efficiently browse through the set of suite configurations that they created and saved themselves (these will not be visible to other users). Users will be able to view the suites and their attributes -- including the appropriate price (based upon user's login).
Browse by customer category	Classify gallery elements by the type of customer that submitted them (or that they were designed for). Allows architects to quickly see what was configured by other architects, computer programmers to see what works for other computer programmers, etc.
Load suite (typical)	Select a previously saved suite to edit. This editing will NOT be performed with the visual configurator interface -- but rather with a "shopping cart" type of interface.
View suite descriptions	Displays information associated with the suite including: creator of the configuration, purpose and recommended usage, benefits, a photograph of the suite in use, etc.
Edit/add suite descriptions	Allows users to add and edit suite descriptions for configurations that they define. Unlike description information entered by Round Three for manufacturer defined suites (which may include images, audio files, etc.) user entered descriptions will only contain text information.
Add & remove workstations from suites	This function is similar adding items to a workstation but without the visual drag & drop interface. Using more of a shopping cart type of interface, users would be able to add workstations from the gallery to their custom suites (and also to remove workstations from their suites).

Add & remove items from suites	This is used to add loose items to suites (e.g. extra shelves that could be placed on either the desk or wall unit in a suite).
Save user custom suite	This function will save the configuration of current suite that the user has loaded in the configurator, overwriting any previously saved configuration.
Save user suite with new title	This function will save the configuration of current suite that the user has loaded in the configurator as a new named suite (e.g. engineer's suite; manager's suite; receptionist suite; etc.).
Display suite price	Shows the current price of the suite as items and workstations are added/removed. This uses the appropriate pricing based upon the user's login.
Create suite update kit	Displays list of items or workstations added to the suite since it was loaded (including the increase in price). Users could then order these additional items as a kit.
Add to cart	Adds the suite in its current configuration to the user's current order.
Add items to cart	Allows users to add individual items to an order (e.g. 10 shelves).
Add workstations to order	Allows user to add a workstation to a shopping cart either from a saved configuration in the gallery or directly from the workstation configurator -- user will be able to specify how many workstations should be added to the cart.
Add workstation upgrade kits to order	Allows the user to add to the shopping cart the items necessary to upgrade a workstation to a new configuration.
View/edit order	Displays a complete list of items in the cart. Should have some way of identifying the complete workstations, complete suites, delta workstations, and delta suites included in the cart. Users should be able to remove items or change amounts.
Automatically save order	The system will automatically save the contents of a cart until the user either checks-out or resets the order.

Manually save order	Users will be able to manually save a named order for completion at a later date. Users will be allowed to have several saved orders along with a current active order.
Load saved order	Allows users to load a previously saved order into the active shopping cart to continue the buying process.
Check-out	Completes the purchase process for the order in the active shopping cart totals price (using appropriate prices according to user login) -- adds appropriate sales tax, performs appropriate collection process, and forwards to fulfillment.
Order history	
Order status	Display a status code for the order (e.g. received, processing, shipped, backorder). When shipped, display tracking numbers for all shipments that have been made against an order.
Status from carrier	Provide a link directly into shipper's online tracking system to view shipment status.
Credit card collection	When the payment method is customer's credit card, performs the credit card transaction -- reserving the amount necessary to pay for the order.
Account collection	When the payment method is to a customer's account, the system will not pass the order directly to fulfillment. It will instead place the order into a an account order queue. A Round Three administrator will open the order from the queue, verify (using a separate accounting system) that the customer has enough credit available to cover the order, then release the order for fulfillment (or cancel the order).
Check collection	When the payment method is by check, the system will display for printing a form with at least an order identifier, a total amount, and instructions for mailing the check. The system will save the order in a queue until Round Three receives and cashes the check. At that time a Round Three administrator can release the order for fulfillment.

Promotions	The system will provide a mechanism to allow Round Three administrators to specify a limited set of promotions. There will be 2 promotion types. The first is a fixed discount associated with a suite. With this promotion, administrators will be able to associate a discount percentage or fixed dollar amount with a particular suite. Users will only receive the discount when they purchase the suite with no modifications. The second type of promotion will be based on a simple set of rules. Administrators will define a promotion and associate either a 1) fixed percentage or 2) a fixed dollar amount or 3) free freight with it. They will then be able to specify a set of rules in three categories: 1) minimum $ amount, 2) promotion code, 3) user type (e.g. business owner). During the checkout process the system will apply the discount amount to purchases that meet the specified rules.
Associate order with salesperson	The system will provide a mechanism to associate salespeople with customer orders. This could be done by any number of methods - e.g: 1) providing salespeople functionality to create an order and email it to the customer (with the system linking the salesperson's ID to the order), or 2) providing customers a field to enter salesperson's IDs during the order process. NOTE: There may be both a dealer salesperson and a Teknion sales rep associated with the same order. The primary purpose of this function is to collect all the information necessary to calculate commissions.
Informational articles & brochureware	This function will allow the system to display articles relevant to purchasing office furniture. The system will group the articles into related topic areas.
Related products	This function will provide a mechanism to associate to articles any products that are related to the articles' contents. Links to the products will appear on the article display pages.
Featured Article	This will allow Round three administrators to identify certain of the articles on the site to be feature articles. In addition to appearing under their assigned topic, portions of feature articles (e.g. their

	title, an associated image, their summary) will also appear in prominent areas of the site.
Featured Suite/workstation	This will allow Round three administrators to identify certain of the items in the gallery as featured items. In addition to appearing in their assigned gallery positions, portions of featured items (e.g. their title, an associated image, their summary) will also appear in prominent areas of the site.
Guided tour through order process	This is a passive presentation that describes to the user how to go through the process of completing and placing an order. At the conclusion of the presentation the user will be ready to start the process.
Hierarchical buying guided tour	This is a passive presentation that describes to the user how to go through the workflow process. At the conclusion of the presentation the user will be ready to start the process.
Point help	Hover boxes etc.
Service request form	Provides a form where customers can enter their question, request, comment, or complaint. When customer submits, the contents of the form are emailed to Round Three.
Configurator wizard	This is an interactive function that guides a user through the process of configuring a workstation. At the conclusion of the guided process, the user will have completed configuration of one workstation.
Order wizard	This is an interactive function that guides a user through the process of completing and placing an order. At the conclusion of the guided process, the user will have completed and submitted one order.
Search	
Chat with CS	Opens a live chat session with a customer service representative.
Review a public gallery item	Users will have the ability to submit comments on any item in the gallery - including both those created by Round Three and those submitted by

	other customers. These reviews will not appear immediately on the site, but will pass first through an editor at Round Three for approval.
Approve/publish review	Editors at Round Three will be able to access an "inbox" of reviews submitted by users about public gallery items. The editors will be able to reject inappropriate submissions. Once satisfied with the submission, the editors will be able to publish the reviews to the site.
Submit an item to the public gallery	Users will be able to submit a workstation or a suite that they configured to bel added to the public gallery. In addition to the configuration of the item, users will be able to submit a title for the item, a description of the item's purpose, a description of its benefits, a photograph of the item installed in their workplace, and any other attributes that might help convey the greatness of their design. The new public gallery item will not appear immediately on the site, but it will first pass through an editor at Round Three for formatting and approval. This function wilt not only encourage users to be creative and share that creativity, but it will also give the more cautious users reinforcement that many others are using the product to solve problems similar to their own.
Approve/publish public gallery item	Editors at Round Three will be able to access an "inbox" of items submitted by users for addition to the public gallery. The editors will be able to edit or add information as necessary and assign meta-data so that the items appear in the appropriate sections of the gallery. Once satisfied with the submission, the editors will be able to publish the new item to the site. If necessary, the editors will also be able to politely reject a user's submission.
Discussion boards	Users will be able to submit free form questions or comments on any topic (e.g. space planning, the most effective designs, etc.). The submissions will pass through a Round Three editor who will act as a moderator. The moderator will be able to reject inappropriate submissions and publish acceptable ones. The moderator will also be able to respond directly to the submission. Once submissions are published, other users will be able to view and

	respond. User responses will also be filtered through the moderator.
Search for customer	Search for a customer among existing accounts. Search criteria could include name, username, order #, email address.
Load customer record	Loads a customer's primary record (i.e., name, address, outstanding balance, etc).
Search prior and current orders	Allows the CSR to search through a customer's order history based on keywords (e.g., suite name).
View prior order history	Displays a customer's prior order history, including ordered not yet submitted.
Modify customer information	Interface for changing a customer's billing, shipping, password, etc.
Identify item to be returned	This function allows a CSR to mark an item from an order as pending return (since users must call a CSR to return an item). The function also includes a field for designating the reason for return. An email may be sent to OI to provide notification for the return.
Add notes/comments to history	Free text fields throughout the customer record so that the CSR can add comments or notes.
View item status	Within a customer's order, displays whether an item has been shipped, is backordered, returned, etc.
Apply credit to account	Used by a CSR to apply a credit to a customer's account. Approval by OI may or may not be required. The system will define certain parameters for applying credit or other special discount.
View customer type (e.g., dealer, se	Displays whether a customer is dealer-referred or self-referred. Depending on the source, the product pricing may vary.
Change customer type (e.g. dealer,	Allows the CSR to change a customer's referral source.
Enter promotion code	Used to enter a promotion code (i.e., special rebate) that provides special terms and/or prices to an order.

View FAQ's	Lists answers to commonly asked questions, such as how to use the site, configurator, shopping cart, etc.
Set up customer account	A series of interfaces allowing the CSR to set up a customer account if the customer does not have access to the site or does not want to do it themselves. A default password is entered by the CSR, which may be changed by the user on their initial login.
Change existing customer order	Used to edit an existing customer order, such as changing quantity or color or adding an item.
Process new customer order	A standard workflow for taking a customer order over the phone. This function leads the CSR through the typical process a user would follow to enter an order.
Cancel order	This function would allow a CSR or an OI Manager to cancel an order either at the request of a customer or for an internal reason (e.g. customer is far over his credit limit, payment check did not clear, etc.). The user will have the option of either moving the order back to the customer's unexecuted order list (so that the customer could re-submit at a later time) or retiring the order in the system.
View customer order	Customer orders that have been finalized (i.e., submitted with a valid credit card) are displayed as a list. Clicking on a specific order will display the relevant details, such as item, quantity, color, and shipping information.
Print pick list	Prints out a list of all items in the order. The fulfillment center personnel will use this list to pick and pack the order for delivery.
Post shipment confirmation	This function labels, within a customer's record, when an order has been shipped. Once submitted, the system will automatically send an email to the customer with a link to track the shipment.
Label item as back-ordered or out of stock	When processing an outstanding order, the warehouse uses this field to show an order is not immediately available. Drop down menus also designate why the item is not in stock.

Label item as returned	Fields for designating items as returned. The fields are located within a customer's record, and designate what item was returned, when it was returned, and what condition it was in.
Search for customer (e.g., by name,	Search for customer record by name or order number.
Notify OfficeImpact	Notification process for sending messages to OI. Most common uses will be for returns.
Add note to customer order	Free text field to add comments or notes to a customer order.
Add/remove items	Interface for adding or removing products from the configurator. Also used to change or add color options.
Define product relationships	Once products have been loaded into the system, this function is used to define how products attach to each other. Within the configurator, the related products will be displayed as options.
Set/change pricing	This function allows the user to set pricing for products, or change existing prices. Note that dealers may set their own prices, in which case OI will not be able to change them.
Set product statistics (e.g., height,	A series of fields to enter detailed information on a product, such as height, width, length, weight, etc.
Design and set default suites	Used to set a default suite that can be ordered "off the shelf" or customized by the user.
View report list	Displays a list of pre-established and pre-programmed accounting reports. Depending on the number of reports in the system, the list can be sorted by type of report.
Run report	Once a user has selected a report, clicking on this button runs the report.
Save to file	Allows the user to save the report, possibly as a PDF, to disk or local drive.

View calculations/definitions	A user can view how statistics within a report are calculated either from the main report list or once the report has been run.
Download detailed supporting data	Downloads the data for a given report to a spreadsheet.
Export to accounting system	This function provides the interface for exporting data from the report tool to the accounting program.
Release a "check" order	
View standard reports	Displays a list of pre-established and pre-programmed management reports. Depending on the number of reports in the system, the list can be sorted by type of report.
View list of data variables	Through the customized report creator, this function allows the user to view which variables are available to include in a report.
Select variables for custom report	A user will select which variables they want to include in a report.
Specify report parameters (e.g., tim	This function is used to select parameters that a specific to a given report variable (e.g., time period, location, sales person, product).
Run report	Once a user has selected a report, clicking on this button runs the report.
Save to file	Allows the user to save the report, possibly as a PDF, to disk or local drive.
Save custom report template	Saves the custom report template for future use. Once the standard report list is refreshed, this custom report will appear in the list.
View calculations/definitions	A user can view how statistics within a report are calculated either from the main report list or once the report has been run.
Download detailed supporting data	Downloads the data for a given report to a spreadsheet.
Print	Prints the report, possibly as a PDF.

View standard dealer reports	Displays a list of pre-established and pre-programmed dealer reports.
Run dealer report	Once a user has selected a report, clicking on this button runs the report.
Save to file	Allows the user to save the report, possibly as a PDF, to disk or local drive.
Print	Prints the report, possibly as a PDF.
Add user (e.g., password, user type	Used to add OI staff and specify privilege level, password, etc.
Add dealer (e.g., dealer admin, loca	Adds a dealer to the system, and establishes a dealer admin account so that dealer employees can be added, pricing may be adjusted, etc.
Set initial dealer pricing and terms	Establishes a default pricing structure for dealers, which may be subsequently altered by the dealer. Also sets any other applicable terms.
Set up dealer with or without invent	Allows the user to specify whether the dealer will carry OI inventory or just use a kiosk.
Remove/disable dealer	Removes or disables a dealer from the site. All underlying users are affected.
Add fulfillment center accounts	Adds a fulfillment center/warehouse and assigns username and passwords.
Remove/disable fulfillment center	Removes or disables a fulfillment center from the site. All underlying users are affected.
Edit system parameters (e.g., order	A series of menu options that allow the user to edit certain system parameters.
Add call center administrator	Creates a call center administrator account. The call center admin will create individual accounts for each CSR.
Assign call center logins (?)	Used to limit and/or manage call center logins if the center does not have an administrator.
Setup company account	This function allows a business owner or responsible manager to create an account / password

	for his business and configure any basic options (e.g. method of payment etc.)
Add employee accounts	Responsible managers will use this function to identify a set of users in their organization who are authorized to order furniture under their supervision. Managers will only need to enter the name and email address of each employee. The system will then email an invitation to the employees that will guide them through the remainder of the registration process.
Define employee classes	When a manager has different classes of employees (e.g. executives & assistants) who will have separate sets of constraints placed on their orders (e.g. $10,000 budget for executives, $5,000 budget for assistants), the manager will use this function to identify the different classes.
Associate accounts w classes	A manager will use this function to associate each employee with a class.
Define constraints for classes	This function will allow a responsible manager to define a set of constraints that apply to each order from a user in a class. The constraints will range from an order budget to acceptable colors. The systems configurators will then only allow users in that class to create orders that fall within the constraints.
Restricted workstation configurator	This is a version of the workstation configurator that will only allow a member of an employee class to configure workstations that fall within the constraints of the class.
Restricted suite configurator	This is a version of the workstation configurator that will only allow a member of an employee class to configure suites that fall within the constraints of the class.
Submit employee instructions	The responsible manager will be able to enter into a form specific instructions and guidelines for employees to follow when placing their orders. The system will then present employees with these instructions when they begin the ordering process.

Submit employee order	When an employee submits an order they will not be asked for payment. The order will be billed as specified by the responsible manager and shipped as specified by the employee.
Approve individual order	The responsible manager will be able to view a list of submitted orders and select one for editing / approval. The system will then display the order and allow the manager to remove items or change amounts if necessary. Once satisfied with the order, the manager can approve it.
Reject individual order	When the responsible manager feels that the order requires more changes than he would like to make (or if he feels that the employee made a mistake) he can use this function to reject the submitted order. The system will present him with a form where he can compose a message to the employee explaining why the order was rejected and containing instructions for modifying the order. The system will then route the order back to the employee. The next time the employee checks on the status of the order, he will be presented with the explanation/instructions from the manager and be allowed to edit the order and resubmit.
View order status (employee)	Employees will use this function to see if their order has been shipped.
Submit aggregated order	Responsible managers will use this function to aggregate all approved orders and view what the entire bill will be. The system will give them a final opportunity to remove items and change amounts. When the manager finally submits the order, it will be processed like any other order.
Restricted shopping cart	Employees will only be able to add items, workstations, or suites to their cart from a restricted set created by the responsible manager. They will also be limited to a maximum $ amount specified by the RM.
View order status (employer)	Responsible managers will be able to see the order status for all of the orders placed by their employees.

Setup dealer account	This function allows a business owner to create an account / password for his business and configure any basic options (e.g. will users be able to purchase directly on the kiosk or will they only be able to print a list to be reentered into the dealer POS system).
Add employee accounts	This function allows a business owner to create accounts for each of his employees that is authorized to act as an agent for the business.
Set retail pricing	The business owner will be able to override the default retail margin percentage for the OfficeImpact line. The system will use this percentage to calculate the retail prices displayed associated with his business.
View dealer cost	The business owner will be able to view the wholesale prices for all OfficeImpact furniture.
Order at cost	The business owner will be able to order demo or stock furniture at wholesale prices without sales tax.
Maximum discount	The business owner will be able to set a maximum discount that his salespeople can extend to customers.
Deactivate customer account	
Associate kiosk account	If an order is placed from a dealer kiosk, the system will associate the id of the dealership and the fact that it was a kiosk sale with the order. The primary purpose of this function is to collect information necessary to calculate commissions.
Associate order with salesperson	The system will provide a mechanism to associate salespeople with customer orders. This could be done by any number of methods - e.g: 1) providing salespeople functionality to create an order and email it to the customer (with the system linking the salespersons id to the order), or 2) providing customers a field to enter salespersons' ids during the order process -. NOTE: There may be both a dealer salesperson and a Teknion sales rep. associated with the same order. The primary purpose of this function is to collect all the information necessary to calculate commissions.

Set customer discount	The salesperson will be able to view a customer's order and set a discount. The discount will be unique for the customer and order and will expire once the order is transacted. A salesperson will only be allowed to set a discount up to the "maximum discount" set by the business owner. A business owner can also use this function, but he will not be limited to any maximum discount.
Collaborate on order	The system will provide a mechanism to allow salespeople to collaborate with customers on orders.
Pre-load customer orders and configurations	Before a salesperson visits a customer, they will save a customer's account and order information to their laptop.
Offline operation of the configurator	This function provides process, options, and functions for using the configurator when not connected to the Internet.
Offline process to fill out order	This function provides a process, options, and functions for filling out a customer order when not connected to the Internet.
Associate order with a customer	Before finalizing a customer order, the user will specify which customer the order is for through a unique identifier.
Save order for processing	Clicking on this button will save a customer order to the salesperson's local drive to be uploaded at a later time.
Upload order for processing	Once re-connected to the site, the salesperson will use this function to upload customer orders for the day.
Set up new customer account	Used to set up a basic customer account (e.g., name, address, login, password).
Upload customer account for activation	Uploads a new customer account and establishes that account as active.
Load sales demos (e.g., site operation, products configurator)	Loads all sales demos and/or materials, such as product information, multimedia flies, etc.

Edit existing customer account	Allows for editing of a customer's account for later upload.
Upload changes to customer account	Uploads a new customer account and establishes that account as active.
Normal process for changing prices (if applicable)	If applicable, the user has the flexibility to modify prices for a customer. This will most likely be used as a final sales incentive.
Email order confirmation to customer	After a salesperson uploads a customer order, an email will automatically be sent to the customer confirming that the order has been placed.
Email account setup confirmation to customer	After a salesperson uploads a newly created customer account, an email will automatically be sent to the customer notifying them that their account is active and provide them with a link to the site.

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